



# UPDATE

AMS Servicing Group

Winston-Salem, NC

April 30, 2002

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- ◆ Fun Fact
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**Holiday Schedule:**  
**Memorial Day**  
**Monday, May 27**  
 (System III<sup>SM</sup> will be available during normally scheduled hours.)

**INSIDE AMS Servicing:**  
**Carolyn Williams, Documentation Supervisor**

Visit our Web site at [www.amsservicing.com](http://www.amsservicing.com)  
 for up-to-the minute publications, forms, and information.

## Our New Look

We have a new masthead for the *AMS Servicing Group Update* to go along with our new name, and we think you will agree that it is quite attractive. You'll also find similar changes on our Web site, our forms, brochures, and all our other documents. Although the look is different, the *Update* will continue to bring you the same useful information that you have come to expect from this publication.

## NAME CHANGE UPDATE

## Update on Web Addresses

The time is here, and we have successfully arrived at our name change date. We want to make sure that you remember our new Web information for our company Web site, *WebConnect*, *DocumentDirect*, and *DataDirect*.

**Company Website** – Our site is changing from [www.efg.net/efgtechnologies](http://www.efg.net/efgtechnologies) to [www.amsservicing.com](http://www.amsservicing.com). This site is packed with information including “How To’s”, our most recent product updates, regulatory changes, and general company information. And remember, the *AMS Servicing Group Update* is loaded to our Web site the Friday before month-end. Please bookmark this site. To find out more about what our Web site offers, please see this month’s *How To*.

**NAME CHANGE  
UPDATE  
(Continued)**

**WebConnect, DocumentDirect, DataDirect** – Access to the on-line system, your reports, and your FTP folders will still be available through your Web browser. Only the names are changing as indicated below:

[datalink.efgtech.com](http://datalink.efgtech.com) will transition to [datalink.amsservicing.net](http://datalink.amsservicing.net)  
[dataprint.efgtech.com](http://dataprint.efgtech.com) will transition to [dataprint.amsservicing.net](http://dataprint.amsservicing.net)  
[ftpservice.efgtech.com](http://ftpservice.efgtech.com) will transition to [ftpservice.amsservicing.net](http://ftpservice.amsservicing.net)

Please bookmark these new sites.

**EDUCATION  
DEPARTMENT  
UPDATE**

**Education Department to Enhance IFAP E-Mail Service**

The Department of Education (ED) plans to enhance its IFAP subscription e-mail service. This tool will keep you up-to-date because you will receive an e-mail alert whenever new information is posted to the IFAP Web site. Go to “Member Services” at: <http://ifap.ed.gov/IFAPWebApp/logonMemberServicesPag.jsp> for more information.

***Dear Partner/Colleague Letter to be Issued Soon***

ED will issue a *Dear Partner/Colleague Letter* in the next several weeks regarding loan assignments and the new ED553 form. To ensure that you receive this information as soon as it is issued, please follow the instructions in the article above. We also will publish this information in future editions of the *Update*.

**The Orange Book Available Now**

The *Federal Perkins Loan Program Status of Default as of June 30, 2001*, also known as the *Orange Book* is now available. This publication contains data that was taken from information submitted by institutions on the 2000-2001 *Fiscal Operations Report* and 2002-2003 *Application to Participate (FISAP)*. This report lists institutions participating in the Perkins Loan Program during the award year that

**E-mail Directory for AMS Servicing Group  
Management and Customer Service Staff**

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Steve Anderson, Conversion Supervisor: <u><a href="mailto:sanderson@amsweb.com">sanderson@amsweb.com</a></u>	Charles Fulp, Facilities/Distribution Mgr: <u><a href="mailto:cfulp@amsweb.com">cfulp@amsweb.com</a></u>
Bob Balsamo, Production Control Supervisor: <u><a href="mailto:rbalsamo@amsweb.com">rbalsamo@amsweb.com</a></u>	Paula Hall, Payment Processing Svr.: <u><a href="mailto:phall@amsweb.com">phall@amsweb.com</a></u>
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Joanna Cortez-Gann, Private Loan Svr.: <u><a href="mailto:jcortez-gann@amsweb.com">jcortez-gann@amsweb.com</a></u>	Betsy Spencer, Account Executive: <u><a href="mailto:bspencer@amsweb.com">bspencer@amsweb.com</a></u>
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Sharal Duncan, Customer Service Rep.: <u><a href="mailto:sduncan@amsweb.com">sduncan@amsweb.com</a></u>	Carolyn Williams, Documentation Svr: <u><a href="mailto:cwilliams@amsweb.com">cwilliams@amsweb.com</a></u>
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John Elliott, Info. Technology Infrastructure Dir.: <u><a href="mailto:jelliott@amsweb.com">jelliott@amsweb.com</a></u>	Kim Wright, Information Technology Dir.: <u><a href="mailto:kwright@amsweb.com">kwright@amsweb.com</a></u>
	World Wide Web Site: <u><a href="http://www.amsservicing.com">http://www.amsservicing.com</a></u>

## EDUCATION DEPARTMENT UPDATE (Continued)

ended on June 30, 2001 and includes a cohort default rate for each institution. For more information, visit: <http://ifap.ed.gov/cbpmaterials/2001OrangeBook.html>.

### Designated Teacher Shortage Areas

The following Web site could help you determine eligibility for teacher cancellations for borrowers teaching in a shortage area. The site's address is:  
<http://www.ed.gov/offices/OSFAP/Students/repayment/teachers/tsa.html>.

### EARMA and Negotiated Rulemaking

2002 Negotiated Rulemaking and FED.Up were the hot topics at the EARMA Annual Meeting in New Jersey this month. FED.Up is an initiative from the House Committee on Education and the Workforce whose function calls for streamlining the regulatory process and improving the integrity of the government's federal student aid programs by addressing regulations that are needless and burdensome. Since the inception of FED.UP [sponsored by Representative McKeon (R-CA)], over 20,000 comments were collected. For more information on FED.UP and 2002 Negotiated Rulemaking, visit the following Web site: <http://www.ed.gov/offices/OPE/rulemaking/index2002.html>.

### Enhancements Made for the Collections System

In January after successful installations at two beta sites during 2001, we introduced our new *Collections System*. We have now installed the PC-based system at six additional customer locations and have released the first series of system enhancements. We will continue to enhance the system's features and functions, primarily based on customer feedback and input.

*The Collections System* is designed to support the internal collection activities for your student loan portfolio. The system is fully integrated with our student loan servicing system, System III<sup>SM</sup>, via a daily file transfer process. Features of *The Collections System* include tickler files and letter writing.

If you would like more information about the AMS Servicing Group's *Collections System*, visit our Web site at: [http://www.amsservicing/NewProducts/New\\_Product\\_Collections\\_System.asp](http://www.amsservicing/NewProducts/New_Product_Collections_System.asp) for the *New Product Update*, or contact your School Relations Coordinator.

### Long-term Customers Recognized

We are happy to announce the names of customers attaining milestone anniversaries with us during the second quarter of 2002. We are celebrating 35 years of partnership

## COLLECTIONS SYSTEM

## CUSTOMER ANNIVERSARIES

*AMS Servicing Group UPDATE*, a newsletter for our customers, is published monthly by AMS Servicing Group in Winston-Salem, NC. Editor: Carolyn Williams. Legislative and Regulatory Editor: Sharon Cameron. Contributors this issue: Beth Bealle, Betsy Burton, Sharon Cameron, LaShonda Fields, and Kim Wilson. NOTE: This publication contains material related to the interpretation of federal rules and regulations of the Title IV Program of the Higher Education Act. While AMS Servicing Group believes the information contained herein is accurate and factual, this publication has not been reviewed or approved by the US Department of Education. Please consult the Department of Education or your legal counsel with questions or concerns. Please send any correspondence to Documentation Department, AMS Servicing Group, PO Box 3176, Winston-Salem, NC 27102-3176 or directly to Carolyn Williams, Editor, at [cwilliams@amsweb.com](mailto:cwilliams@amsweb.com).

## **CUSTOMER ANNIVERSARIES (Continued)**

with three schools, **Claflin College**, **Davidson College**, and **Rollins College**, and 11 schools, including **Danville Area Community College**, **Kean University**, **Marymount University**, **New Jersey City University**, **Ramapo State College**, **Richard Stockton College of New Jersey**, **Rowan University**, **The College of New Jersey**, **University of New Haven**, **Wells College**, and **William Paterson University** have been customers for 30 years. A complete list of customers attaining 5, 10, 15, 20, 25, 30, and 35-year anniversaries is attached.

- **Attachment:** *Long-term Customer Anniversaries*

## **INDEX**

### **Index Available**

A first quarter index for the *AMS Servicing Group Update* is available online and as an attachment to this month's *Update*.

- **Attachment:** *Index*

## **STUDENT LOANS 101**

### ***Student Loans 101***

Thanks to everyone that attended the first session of *Student Loans 101*, the workshop was a big success. To personalize our training for student loan novices, we limited the class size to ten participants. This class represented student loan administrators from nine colleges and universities. The session was presented online and covered how to read reports on *DocumentDirect* and how to process transactions using DataLink via *WebConnect*. Attendees from two schools provided valuable insight into what topics to include in the advanced session that we are currently developing. The best part of the workshop was the participation from the group. You make the difference!

## **REGIONAL MEETINGS**

### **Richmond Regional Meeting Update**

The Richmond Regional Meeting was held on April 15. Hosted by the **University of Richmond**, the meeting was attended by 17 customers from 12 different schools. Billi Wolfe, School Relations Coordinator for the North, Pattie Mastin, School Relations Coordinator for the South and Betsy Burton, Market Development Director facilitated the meeting. B.J. Lee with Williams and Fudge gave an excellent presentation on "Choosing a Collection Agency" and sponsored a lunch for the group. Many thanks go to **Irma Guajardo** at the University of Richmond for making this year's Richmond Regional such a success!

### **Regional Meetings Scheduled**

We are looking forward to Regional Meetings in Seattle on July 23 and **Brandeis University** in Boston, MA, in October. Other meetings are planned for Columbia, SC and Florida. If you are interested in hosting one of these open dates, please contact your School Relations Coordinator.

**The mission of AMS Servicing Group is to provide high quality, accurate, and effective processing services in response to the needs of our customers. We strive to consistently provide superior service and innovative solutions at a competitive price.**

**Conference Schedule**

Register on-line for the **10th Annual California College and University Loan Administrators Association (CCULAA) Conference**, which will be held from June 9 - 12 at the Hyatt Regency Hotel in Irvine, California. The theme of this year's Conference is "Partnership: The Fabric of Collaboration." This low-cost, information-packed conference includes updates from the federal government, as well as information about collections, technological advances, team building, and more. The speakers are respected as authorities in their fields. Irvine is also a great place to combine a quality professional conference with a location that offers plenty of opportunities to relax and have fun. CCULAA's Web address is [www.cculaa.org](http://www.cculaa.org).

**Cutoff Dates**

The cutoff dates for May and June are listed below.

Transaction	May 2002	June 2002
Last day to receive collection payments	05/28/02	06/25/02
Last day to receive regular payments	05/29/02	06/26/02
Last day for online payments	05/31/02	06/28/02
Date final post begins	05/31/02	06/28/02
Report date used for final post	05/31/02	06/30/02
Last day deposits created for deposit to bank account	05/31/02	06/28/02

**CUTOFF DATES****Fun Fact**

Did you know that the transition from EFG Technologies to AMS Servicing Group resulted in changes to thousands of screens, hundreds of forms, new business cards for everyone and many marketing materials, booths and supplies? We are excited about our new look!

**FUN FACT**

A decorative border with a repeating pattern of stylized flowers and leaves in a light pink color, set against a darker pink background.

## **Second Quarter Customer Anniversaries for 2002**

### **Thirty-five Years**

Claflin College  
Davidson College  
Rollins College

### **Thirty Years**

Danville Area Community College  
Kean University  
Marymount University  
New Jersey City University  
Ramapo State College  
Richard Stockton College of New Jersey  
Rowan University  
The College of New Jersey  
University of New Haven  
Wells College  
William Paterson University

A decorative border with a repeating pattern of stylized flowers and leaves in a dark red color, framing the central white text area.

## **Second Quarter Customer Anniversaries for 2002**

### **Twenty-five Years**

Houston Community College  
Jefferson Community College  
Lincoln University (MO)  
University of Texas at Dallas

### **Twenty Years**

College of William and Mary  
Lynchburg College  
Marist College  
Prairie View A & M University  
Sam Houston State University  
Texas Southern University  
Tiffin University  
University of New Orleans  
University of North Texas

A decorative border with a repeating pattern of stylized flowers and leaves in a light pink color, set against a darker pink background.

## **Second Quarter Customer Anniversaries for 2002**

### **Fifteen Years**

College of Insurance  
Lee University  
Massachusetts College of Pharmacy  
University of Washington

### **Ten Years**

University of Dubuque

### **Five Years**

Allen University  
Middlebury College  
Texas Society of CPAs

**Attachment**  
**AMS Servicing Group Update**  
**Index for 2002 Issues**  
**January -March**

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**Audit**

- Are You in Compliance? (Mar., p.7)

**Customer Anniversaries**

- Long-term Customer Anniversaries Recognized (Jan., p.5) *Attachment:* Customer Anniversaries

**Cutoff Dates**

- Feb./March (Jan., p.6)
- March/April (Feb., p.5)
- April/May (Mar., p.10)

**Department of Education**

- Application Processing System for 2002-2003 Start Up (Jan., p.2)
- Changes and Enhancements to Application Processing System (Jan., p.2)
- Don't Pay Off Old Loans (Mar., p.4)
- ED Clarifies Use of New Perkins Promissory Note (Jan., p.1)
- Fourth Department Letter on Terrorist Attack Relief Still Pending (Feb., p.2)
- Further Clarification on Use of New Perkins Promissory Notes (Mar., p.2)
- Guidance Received from ED in 1997 Applies to New Prom Notes (Mar., p.4) *Attachment:* ED Letter Dated March 27, 1997
- Guide to 2002-2003 ISIR Available (Jan., p.3)
- Information for Visually and Hearing-Impaired Students Available (Mar., p.2)
- Information Issued on Tentative 2002-2003 Funding Levels Issued (Feb., p.2)
- Listing of Low-Income Schools for 2001-2002 Now Available! (Mar., p.4)

- New Boxes on the Open-Ended Promissory Notes (Mar., p.3)
- President Announces New King Scholarship (Feb., p.2)

- *The Student Guide* for 2002-2003 is now available on the Internet (Mar., p.2)
- Web Sites for Allied Health/Medical Technician (Mar., p.4)

**How To**

*Attachments*

- Assign a Loan (Mar.)
- Complete a Loan Verification Certificate (Feb.)
- Get the Most From Your *UPDATE* (Jan.)

**inside EFG - Profiles**

*Attachments*

- Beam, Teresa (Feb.)
- Cameron, Sharon (Mar.)
- Halsey, Raffaele (Jan.)

**Legislative Updates**

- Bush Proposes Level Funding for Title IV Programs for FY 2003 (Mar., p.1)
- Congress Approves ED Funding (Jan., p.1)
- Congress Approves Heroes Act of 2001 (Feb., p.2)

**Miscellaneous**

- Annual Statements to be Mailed in February (Jan., p.3)
- Annual *UPDATE* Index Available (Jan., p.5) *Attachment:* 2001 *UPDATE* Index
- Cameron Receives *Anne-Marie Miller Service Excellence Award* (Mar., p.1)
- EFG Technologies Will Become

AMS Servicing Group on May 1 (Feb., p.1) *Attachment:* Name Change Announcement and Q&A Guide

- HELP Desk Provides Technical Assistance (Jan., p.4)
- Market Development Department Restructured (Mar., p.6)
- More Information on Our Name Change (Mar., p.5) *Attachment:* Press Release
- Teacher Cancellation Requests – We Need Your Help! (Feb., p.4)

**New Customer – Welcome!**

- Welcome PLP Customers (Feb., p.1)

**New Product Update**

- Introducing ... The EFG Technologies Collections System (Jan.)

**NSLDS**

- NSLDS Loan Error Report Reminder (Jan., p.4)

**Regulatory Updates**

- Correction for Worksheets on Paper 2002-2003 Renewal FAFSA (Jan., p.3)
- Federal Work-Study Community Service Expenditures Scrutinized (Feb., p.3)

**Services/Enhancements**

- Announcing a New Product – Collections System *Attachment:* New Product Update--Collections System (Jan., p.4)
- Are You Using Our NSC Services? (Feb., p.3)
- Billing Consolidation Helps

## Attachment

- Borrowers (Jan., p.3)
- Direct Line for Borrowers Provides Easy Access (Feb., p.5)
- Early Intervention Program Available Now! (Jan., p.4)
- Enhanced Service Available Now! (Feb., p.4)
- Loan Consolidation Information for Exit Interviews (Feb., p.4)
- NSC Deferment Processing Service (Feb., p.3)
- NSC Separation Date Management Service (Feb., p.3)
- New Customer Service Representatives in Training (Feb., p.5)
- New Technology in the Call Center (Mar., p.7)

### System III Processing Tips

- Use the Main and PAYO Screen (Mar., p.8)

### Taxpayer Relief Act (TRA)

- Form 1098-Es Mailed in January (Jan., p.3)

### Workshops/Regional Meetings

- Conferences Scheduled (Jan., p.6; Feb., p.5; Mar., p.9)
- It's Not Too Late for "Student Loans 101" (Feb., p.5)
- Regional Meetings (Jan., p.5; Feb., p.5; Mar., p.9)
- Workshop Scheduled (Jan., p.5)  
*Attachment: Student Loans 101 Registration Form*

### Web Site

- New E-Addresses (Mar., p.5)

# How To

## Use our Web Site

**[www.amsservicing.com](http://www.amsservicing.com)**

Are you a regular visitor to the AMS Servicing Group's Web site? If you're not, you're missing an opportunity to quickly access the information you need without worrying about filing, maintaining notebooks, or dropping everything to look for that one form you need. If you aren't regularly visiting our site, stop reading and log on to our Web site right now at: [www.amsservicing.com](http://www.amsservicing.com).



### Customer or Borrower?



The first screen you encounter allows you to make a choice between accessing customer pages or borrower pages. We split the site so borrowers could easily access the information they needed, while linking customers to the same information they always had, plus more! After reaching the Customer Service page, you are offered the options listed below.

### About AMS Servicing Group, *DocumentDirect* or *WebConnect*, School Services, and Products.

These pages give you an overview of who we are as a company, the opportunity to register for *DocumentDirect* or *WebConnect*, and a full description of our services and products. If you examine these pages, you might find new ways that we can help you work more efficiently.

### Downloadable Forms

Add this page to your favorite places because you'll love using it. Almost all the forms you need to interface with our company are available from this area on our Web site. You don't have to worry about keeping a stock of forms on hand that you might not ever use. Just click on the form you need to view it and then print it out. It's like having an assistant available 24/7 to help you find what you need.




The files are all in PDF format so no matter what platform you are operating under or what word processing program you are using, you will be able to read and print our forms. Because the Customer Forms page has a link to the Borrower Forms page, you can print up a supply for students or you can tell them where they can find all the forms they need. Please remember to install the latest version of Adobe Acrobat Reader to make sure your forms always print correctly. This free software is available at [www.adobe.com](http://www.adobe.com). If you have further difficulty printing forms from our Web site, please contact our Help Desk at [HelpDesk@amsweb.com](mailto:HelpDesk@amsweb.com) or call (800) 458-4492, Ext. 2111.

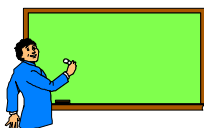


## Manuals Online!

**Call your School Relations Coordinator  
to find out how to access them!**

## Publications

Again you have the information you need at your fingertips. Imagine trying to keep track of several years of *Updates*, *NSLDS Updates*, *System III Connections*, *How To...* features,  and *Inside AMS Servicing* profiles. By accessing our Publications page, you can branch off to any of the publications listed above. By reading these publications online, you can access important resource information through hyperlinks included in each article without finding the site yourself. The *Update Index* takes you directly to the issue that you need, and bookmarks link you directly to the article you are looking for. A listing of our monthly *How To...* features provide quick access to instructions on commonly used procedures. In addition to reading these publications in web format, each document is available in PDF format with bookmarks for your ease in reviewing.



## Deferment Information

Even experts in processing deferments will find this page a helpful resource. All the criteria, forms, and other necessary deferment information is listed in one source. Borrowers can also access this information through their site so you can refer them to this page for information and forms.

## School Relations

If you have forgotten how to contact your School Relations Coordinator (SRC), you can check out our SRCs and the states in their territories from this site. By clicking on their e-mail addresses, you can e-mail them very easily.



## Workshops/Regional Meetings/Conferences

Find out about upcoming workshops our company sponsors through this page. You can download a registration form or e-mail school relations from this site to sign up for these training opportunities. You can also access information about upcoming regional meetings in your area as well as learn about conferences that might be of interest to you.

## How to Contact Us

From this page, you can find out important information about our hours, telephone and fax numbers, and your Customer Service Representative, and e-mail key staff members from this page. We link you to our Borrowers Service information page from here so you access the information we provide for borrowers.



## Borrower Services



We're all on the same page here. You have direct access to what we are telling your borrowers so you can tell them the same thing. On the Borrower side of our Web site, we provide general information about our company and access to downloadable forms, deferment information, and contact information along with special instructions on how to use our Interactive Voice Response System (IVR). Also, borrowers can link to information about federal loan consolidation which is available from our affiliate company, Academic Management Services (AMS).

**If you have any technical questions, please contact our Help Desk at [helpdesk@amsweb.com](mailto:helpdesk@amsweb.com) or call (800) 458-4492, Ext. 2111.**

# Carolyn Williams

## *" Truly A Mission in Motion"*

You would never see Carolyn Williams or notice her impact on AMS Servicing Group if you did not know she is the primary means of communication with customers across the country. Carolyn's creativity and insight give the company an outlet to provide the most current information to our customers. Soft spoken, yet incredibly witty, each month Carolyn puts her desktop publishing skills to work. Actually, it's more like each day and each week.

At AMS Servicing Group, Carolyn has the unique responsibility as Documentation Supervisor, although, around the office she is known by the Documentation 'Specialist'. She is certainly a whiz with her graphic design knowledge. Carolyn's responsibilities include publishing the *Update* and internal *Mission In Motion* newsletters, posting the latest information to the AMS Servicing Group Web site, writing the *Inside AMS Servicing* feature (This month School Relations Coordinator, LaShonda Fields, wrote the feature on Carolyn.) and undertaking an abundance of other tasks. Most of you probably notice that there are constant changes to our site. A few months ago, Carolyn took the initiative of splitting the web page between customers and borrowers. Her ability to know what customers want in terms of information, has made her aware of the need to navigate easily, make the site as user friendly as possible, and also put much of the text in layman's terms.

Carolyn is diligent in her response to internal customers, and holds the highest standards for customer service. She mentioned how she detests being the victim of bad customer service and always puts forth that special effort. According to Carolyn, she finds the ability to be creative one of the most rewarding parts of her job. She said, "It's amazing people pay me to do something that I like so much." She enjoys the challenge that graphic and web design brings and considers it a true visible accomplishment. Carolyn values her colleagues, especially her Senior Word Processing Specialist, Carolyn Poplin, a 21-year veteran of the company, and says "Carolyn has been invaluable!"

Carolyn is originally from Raleigh, North Carolina and has been at the company for almost 2 years. In between requesting contributions for the newsletter, formatting, and posting it to the website, she doesn't find the time to do much else during the workday. Before coming to work for AMS Servicing Group, Carolyn received her undergraduate and Masters degrees in English and Sociology respectively

**Carolyn Williams:**

*"It's amazing  
people pay me to  
do something that  
I like so much."*



from North Carolina State University. In the early 1980's she worked as a Coordinator in a local shelter for battered women and rape crisis center. In fact, she wrote her Master thesis on *Coping Responses of Battered Women*. She also worked as a Director of Development for a non-profit organization. Working in these capacities has given Carolyn a special caring compassion that she extends in her writing as well as in her relationships within the organization.

What does Carolyn do in her spare time after being so busy all day at work? She enjoys "micromanaging" her 16 year-old daughter, Jaclyn's life. Her husband of 25 years, John, works to micromanage her as she micromanages their daughter. She stays active as a soccer and basketball mom and is now involved in the very exciting time of reviewing potential colleges with her daughter. With her clever sense of humor she said, there are "3,500 (colleges and universities) in the country and half send us mail." Her other hobbies include watching the "Home and Garden" channel. She commented that if she had to live life all over again she would be a interior decorator. With poise and humor, she remarked in the words of Martha Stewart, "A good idea done to perfection can't help but succeed". Carolyn's ideas and innovative abilities certainly prove to be one of the successes of this company.